Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway

Enterprise Service Management

School Based Health Center (SBHC)

Fall 2006 Release 3 Version 1

Table of Contents

Module 1: Getting Started

Introduction

The Virtual Gateway is a single point on the internet for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

Enterprise Invoice Management/Enterprise System Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers and is one of the many services offered through the Virtual Gateway. Use of specific EIM/ESM functionality is discussed in later modules.

This module discusses the following topics:

- What is the Virtual Gateway
- System Requirements
- Accessing the Virtual Gateway
- Accessing provider services (including EIM/ESM)
- Password management

What is the Virtual Gateway?

The goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service provider staff
- Consumers

In addition to EIM/ESM, the Virtual Gateway also offers:

- **Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
- **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
- **Common Intake:** A single, online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients (login required).

What is the Virtual Gateway?

(continued)

- **Transitional Assistance Gateway:** An online inquiry tool for registered agencies to view secure case management information for various transitional assistance programs, including Food Stamps, financial assistance, and homeless services (login required).
- **Provider Data Management:** An online service that gives *Purchase of Service (POS)* providers a single place to view, upload and edit information commonly requested by Health and Human Services agencies. The service also provides EOHHS agencies with a single place to view provider information (login required).
- **Service and Transition Planning:** An online tool for registered EOHHS staff and providers to support collaborative treatment planning and referral services for certain children served by EOHHS (login required).
- **IRIS Services for Deaf and Hard of Hearing Consumers:** An online service for service providers to request ASL interpreter or CART services on behalf of consumers; for ASL interpreters and CART reporters to post availability schedules, review and apply for open jobs (login required).
- **Homeless Management Information Systems:** The *Homeless Management Information Systems (HMIS)* perform data collection to capture information about citizens who experience being homeless over a period of time (login required).
- **Mental Retardation Quality Management Reporting (HCSIS):** A service for Purchase of Service providers, Department of Mental Retardation (DMR) staff, human rights coordinators, and others to file clinical information and reports on incidents, medication occurrences, restraints, and investigations for DMR clients (login required).
- **Senior Information Management System (SIMS):** An online data collection, case management, and reporting tool for Executive Office of Elderly Affairs (EOEA) agencies and providers. It enables users to track various programs for elders, including intake and referral, home care, nutrition, clinical assessments, and more (login required).

System Requirements

System Requirements for EIM/ESM and the Virtual Gateway

All computers used to access the Virtual Gateway require Internet Explorer 6.0 or higher.

For the EIM/ESM application, the minimum system requirements are:

- Windows (98, 2000 or XP Business)
- Internet Explorer 6.0 or higher
- 800x600 screen resolution
- 300MHz CPU and 128MB RAM

Additionally, the preferred system features to enhance the performance of EIM/ESM are:

- Windows XP (Business Class)
- 1024x768 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Operating System
  - Mac OS X
- Browsers:
  - Safari (Mac)
  - Firefox
  - Netscape

Note: Testing on the EIM/ESM application has not been conducted on these alternative platforms therefore compatibility issues may result.

Tip: If a lower screen resolution is selected, then the user needs to select the “Smaller” text size.

1. Select the View menu from the Internet Explorer browser.

Select **Text Size>>Smaller**.

Accessing the Virtual Gateway

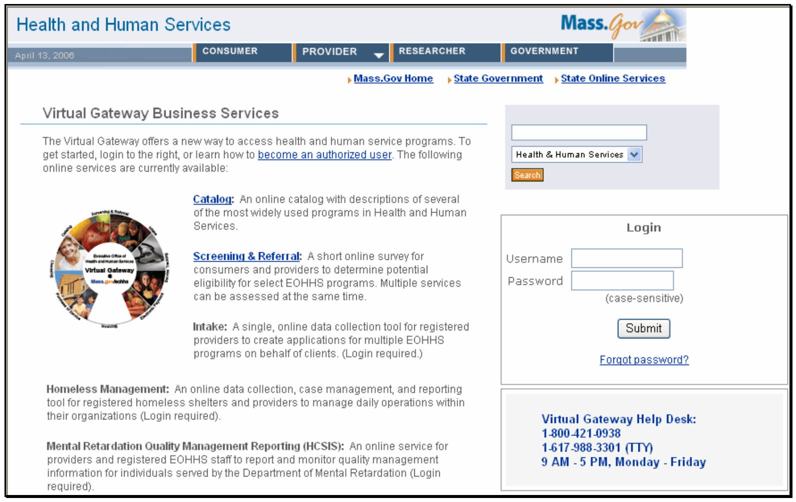
Access to EIM/ESM is through Virtual Gateway Provider Services. To Access Provider Services:

1. Open an Internet Explorer session.
2. Type the web address http://www.mass.gov/eohhs in your browser.
3. Select **Provider Services Gateway ENTER>>**

Tip: Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application *not* your internet browser's **Back** and **Forward** ( ) buttons.

Accessing the Virtual Gateway
(continued)

You are directed to the Business Services page for login.



4. Enter **Username** and **Password**.
5. Click **Submit**.

*The **Virtual Gateway Business Services** page displays.*

Note: *Security requires that each person have a Virtual Gateway username and password.*

Accessing Virtual Gateway Services

The **Virtual Gateway Business Services** page displays after you have successfully entered your username and password. You can select the service(s) you wish to access from this page. You can call the Virtual Gateway Help Desk if you need any assistance: 1-800-421-0938.

Note: Once you are logged in, you will have access to EIM/ESM.

Password Management

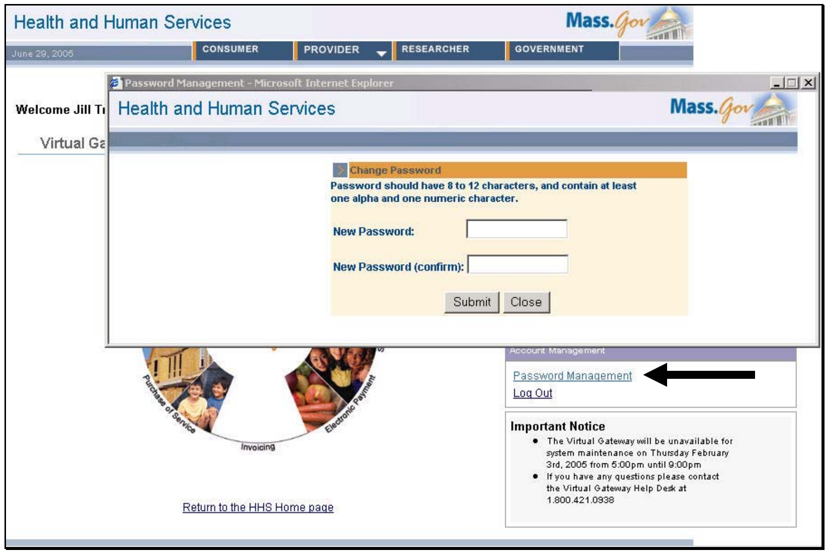
All users must change their password at first login.

After your initial login, you can change your password at any time by clicking on the Password Management link.

Password policy rules:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway help desk
- The password must contain between 8 and 12 characters and have at least 1 alpha and 1 numeric character
- Passwords are case-sensitive
- Users will be automatically logged out of the system after 30 minutes of inactivity

Password Management



Important: You will need to disable any pop-up blocker in your browser to allow the change of password screen to appear. Contact your network administrator if you need assistance with this process.

Once you login, you can change your password.

To change your password:

1. Access the Business Services page.
2. Click the Password Management link.
   The Change Password popup window appears.
3. Type your new password twice.
4. Click **Submit**.
5. Click **Close**.

Virtual Gateway Help Desk Information

The Virtual Gateway Help Desk is available to assist with:

- General questions regarding the Virtual Gateway
- Technical questions or system issues
- Questions regarding how to use EIM/ESM
- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address
- Module/page/field you were working on (if applicable)

- Description of the issue or error message
- Perceived criticality

You can reach the Virtual Gateway Help Desk at 1-(800)-421-0938 from 9 a.m. to 5 p.m. Please leave a voice mail if calling after hours.

Note: If the Help Desk is unable to resolve your issue while on the phone, a ticket number will be issued along with any relevant workarounds.

Module 2: Introduction to EIM/ESM

Introduction

The EIM/ESM service provides functionality for a variety of provider and agency users. These functions are presented as modules within EIM/ESM. Modules that are required to complete day-to-day responsibilities are covered in this user manual. Users have access to their required modules when logged into EIM/ESM. Other modules will not be accessible.

Each module in the EIM/ESM service has a corresponding module in one of the EIM/ESM user manuals. This module discusses the following topics:

- What is EIM/ESM?
- EIM/ESM Overviews
- Benefits of EIM/ESM

What is EIM/ESM?

Enterprise Invoice Management/Enterprise Service Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers.

Enterprise Invoice Management (EIM) is an EOHHS-wide invoicing and service delivery reporting tool which coordinates invoicing and reporting across POS programs, agencies, and providers.

Enterprise Service Management (ESM) supports providers contracted through the Department of Public Health (DPH) with a client management and service tracking tool. ESM fully integrates and coordinates delivery and administration of care across DPH programs, bureaus, and providers.

This manual focuses on client and service management functionalities available in ESM. Additional information about EIM/ESM can be found under the Provider tab of the EOHHS web page: www.mass.gov/eohhs.

EIM Overview

EIM (Enterprise Invoice Management) enables provider organizations to invoice or bill EOHHS agencies for certain Purchase of Service (POS) contracted services.

Invoices:

- Are generated and submitted by providers through EIM
- Are automatically adjudicated within EIM
- Adjudication results can be viewed in EIM

PRC (Payment Request for Commodity):

- Are generated within EIM
- Can be tracked through EIM

ESM Overview

ESM (Enterprise Service Management) enables provider organizations to maintain their client roster, program enrollments, service plans, case management plans, and encounter documentation.

Client Management:

- Accepts electronic applications
- Maintains client information

Service Management:

- Determines eligibility
- Enrolls clients
- Manages authorizations
- Enables service planning and tracking

Note: Initially, ESM will be deployed for DPH programs only.

Benefits of EIM/ESM

How does the EIM/ESM service benefit providers?

- **Simplifies** reporting and invoicing for purchased services
- **Enables** providers to track invoices through the adjudication and payment process, providing information about status, adjustments, date of payment, etc.
- **Provides** unprecedented enterprise reporting capabilities to provider organizations as well as agencies

What are the benefits of EIM?

- Provides expedited payment
- Provides real-time payment processing
- Offers access to up-to-date financial data

What are the benefits of ESM?

- Provides access to dynamic data collection and reporting
- Provides online, client-based enrollment
- Enhances referral throughout treatment episode

Module 3: EIM/ESM Navigation Basics

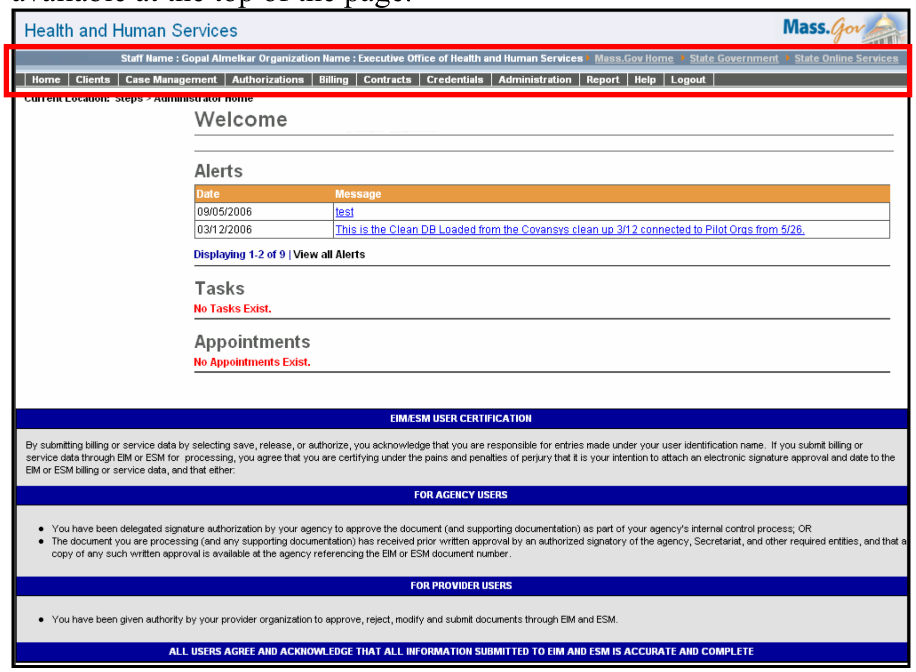
Introduction

Navigation is simple and consistent throughout each module in EIM/ESM. The topics in this module will help you:

- Understand the modular structure of EIM/ESM
- Navigate through each module
- Search for records

Module Links

When a user logs into EIM/ESM, the **module links** are immediately available at the top of the page.

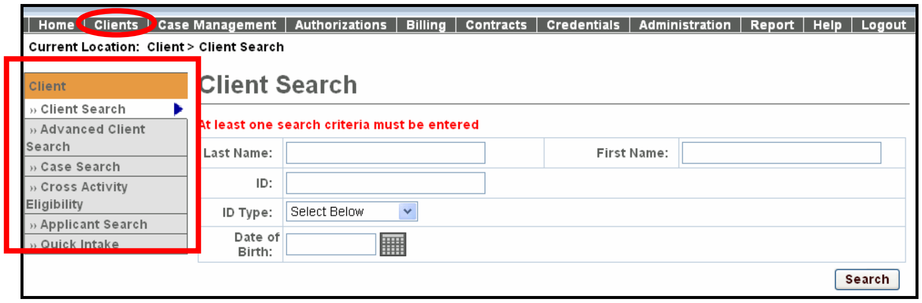


Each **module link** corresponds with a functional area: the **Clients** module provides access to eligibility and enrollment functions, the **Report** module provides access to reports, etc.

Clicking a module link to navigates you to the corresponding features.

The Navigation Bar

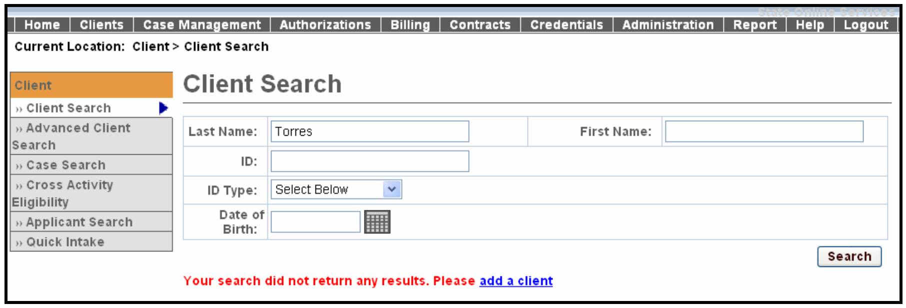
When a module is selected, a corresponding **navigation bar** appears on the left side of the page, allowing users to navigate to related functions.



The default page—the page that displays first when a module is selected—varies by module, but it is typically a search page.

Search

Searching for records is the first step in most EIM/ESM functions. Users search for clients, invoices, contracts, etc., depending on the functions they use.



Users search by entering a value or wild card search in a criteria field.

The wild card is **%.** It can be used in alpha-numeric fields alone or with other characters:

If the criteria is…	The results will be…
%son	Thompson, Johnson, Mason
m%n	Man, Mason, Mellon

The **%** can be used alone to return all records; however, searching for all records may be slow process.

Tip: To narrow down search results, populate as many search criteria fields as possible (for example last name, birth date etc.)

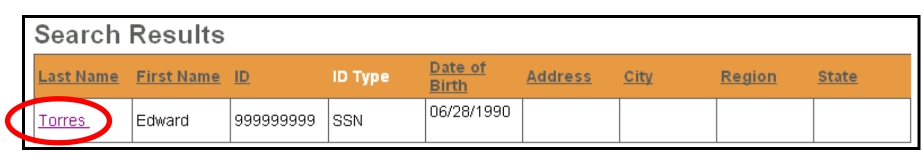
To search:

1. Enter criteria in a field
2. Click 

The search results appear.

Search Results

Search results consist of a list of linked records:



Click the linked field to select and view the record.

Breadcrumbs

Breadcrumbs at the top of each page allow the user to navigate to previous pages easily.

Current Location: Client > Client Search > Face Sheet > **Client Summary**

In the above example, the current page displayed is **Client Summary**. To return to the Client Search page, simply click Client Search > . Do not use the browser Back button.

Module 4: Intake, Eligibility and Enrollment Overview

Overview

Who	Provider Intake Staff who enroll applicants in School Based Health Centers.
What	1. Manage client intake information 2. Screen clients for eligibility 3. Enroll clients into a program
When	A client is created in ESM for eligibility screening and enrollment.

Module 5: Searching for a Client

Searching for Clients

Client Search is the only way to access client records.

Client Search should be used prior to creating a new client record to determine whether the person already exists in the database. This helps avoid duplicate records.

You can use the search feature to locate records for review and enrollment.

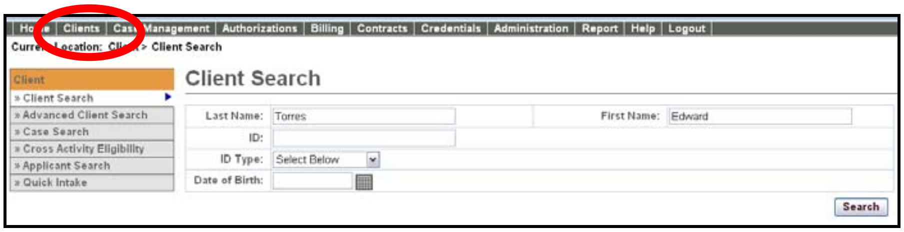
Access Client Search Page

First, log in to *ESM*.

To access the **Client Search** page:

Click the **Clients** module.
*The **Client Search** page appears.*

Tip: The **Client Search** page is the default.



Hints:

- To add a client, enter both a first and last name.
- The unique identifier (ID) is an alpha code only.
- To search by the client's auto-generated unique identifier, use either the first or last name field.

Search Process

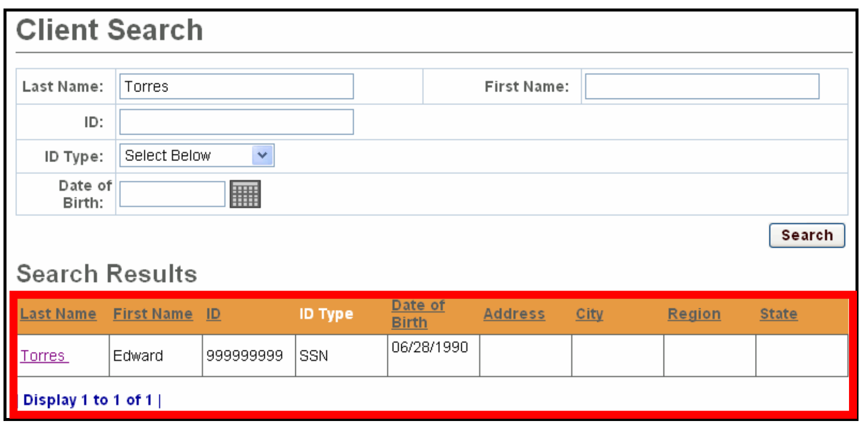
Begin at the **Client Search** page.

1. Enter search criteria.
    - You can search by partial criteria in the names fields (for example, **A** returns all names beginning with A)
    - You can use the **%** wild card for all fields except social security number. Using the wild card alone in a name field returns all records; however, the response time is slower for wild card searches.
    - Available fields include:
        - First or last name
        - Date of birth
        - ID/ID Type

Tip: To narrow down search results, populate as many search criteria fields as possible.

2. Click 

The search results are listed below the search criteria.



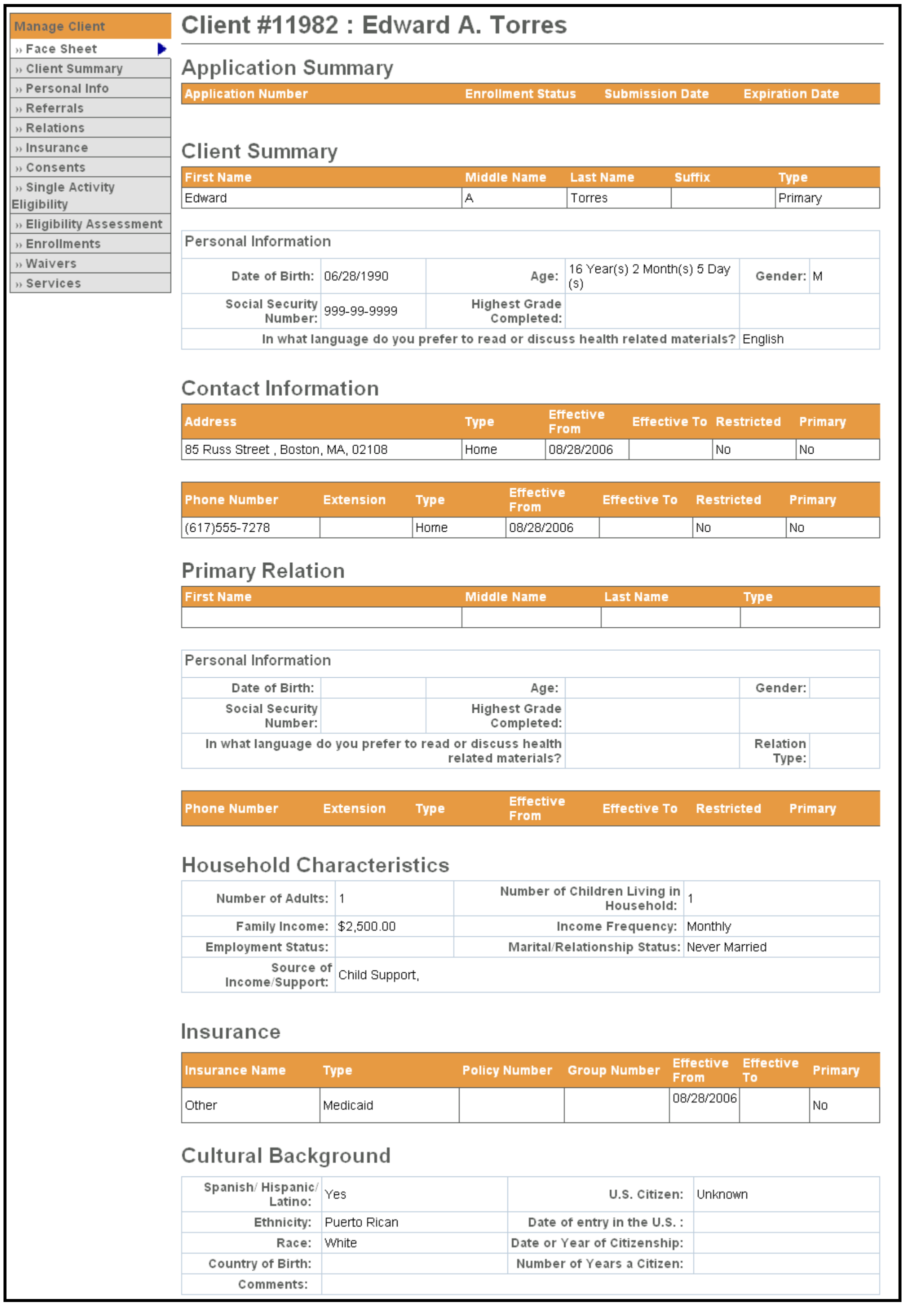
3. Select the linked field from the search results.

*The **Face Sheet** page appears.*

Important: Review **Face Sheet** to check SBHC required eligibility data fields are populated.

Face Sheet

The information displayed on the **Face Sheet** is collected during intake.



Manage Client
- Face Sheet
- Client Summary
- Personal Info
- Referrals
- Relations
- Insurance
- Consents
- Single Activity Eligibility
- Eligibility Assessment
- Enrollments
- Waivers
- Services

Client #11982 : Edward A. Torres

Application Summary

Application Number	Enrollment Status	Submission Date	Expiration Date

Client Summary

First Name	Middle Name	Last Name	Suffix	Type
Edward	A	Torres		Primary

Personal Information

Date of Birth:	06/28/1990	Age:	16 Year(s) 2 Month(s) 5 Day (s)	Gender:	M
Social Security Number:	999-99-9999	Highest Grade Completed:			
In what language do you prefer to read or discuss health related materials?	English				

Contact Information

Address	Type	Effective From	Effective To	Restricted	Primary
85 Russ Street , Boston, MA, 02108	Home	08/28/2006		No	No

Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary
(617)555-7278		Home	08/28/2006		No	No

Primary Relation

First Name	Middle Name	Last Name	Type

Personal Information

Date of Birth:		Age:		Gender:	
Social Security Number:		Highest Grade Completed:			
In what language do you prefer to read or discuss health related materials?				Relation Type:	

Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary

Household Characteristics

Number of Adults:	1	Number of Children Living in Household:	1
Family Income:	$2,500.00	Income Frequency:	Monthly
Employment Status:		Marital/Relationship Status:	Never Married
Source of Income/Support:	Child Support,		

Insurance

Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary
Other	Medicaid			08/28/2006		No

Cultural Background

Spanish/ Hispanic/ Latino:	Yes	U.S. Citizen:	Unknown
Ethnicity:	Puerto Rican	Date of entry in the U.S. :	
Race:	White	Date or Year of Citizenship:	
Country of Birth:		Number of Years a Citizen:	
Comments:			

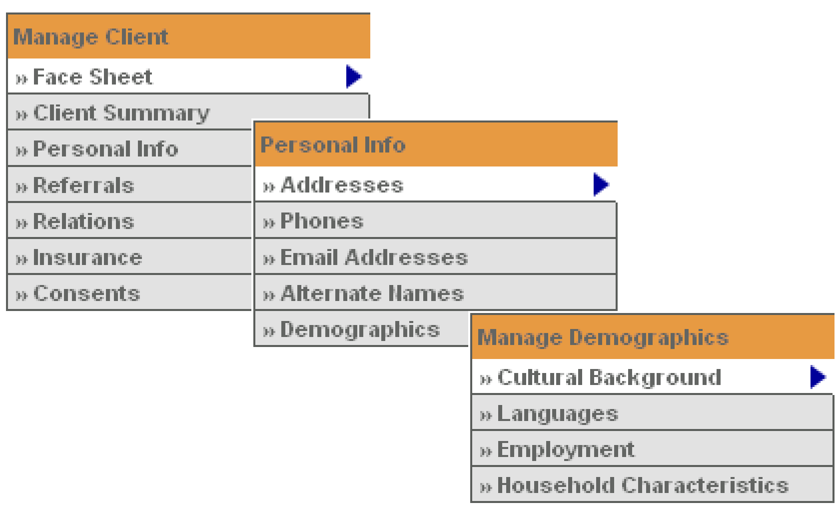
Tip: You cannot edit information directly within the **Face Sheet**; however, you can easily navigate to editable forms from this page by selecting appropriate menu in the navigation bar on the left side.

Face Sheet Information

The **Face Sheet** is a summary of all client information available in the system.

It includes:

- client summary information
- personal information
  - contact information
  - demographic information
    - household characteristics
    - cultural background
- referrals
- relations
- insurance information
- consents



Module 6: Adding and Editing a Client

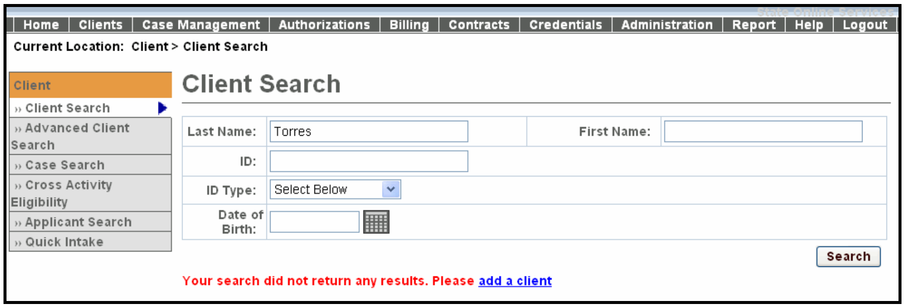
Client Information Overview

Your search results is a summary of all clients/students:

- who are currently enrolled in the program
- with an enrollment status that has not yet been determined
- with enrollments that have been expired

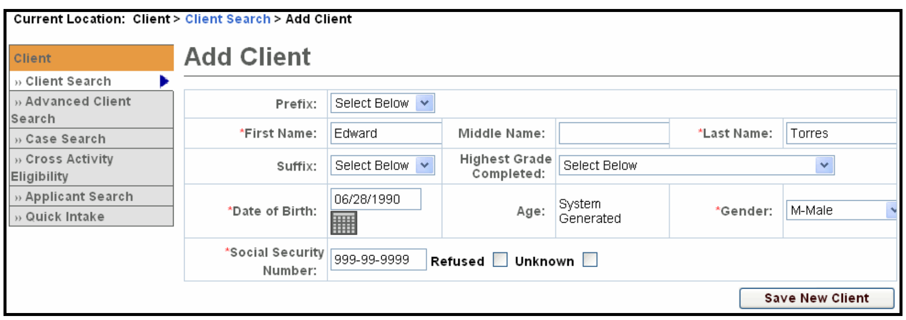
Adding a Client

Begin at the **Client Search** page.



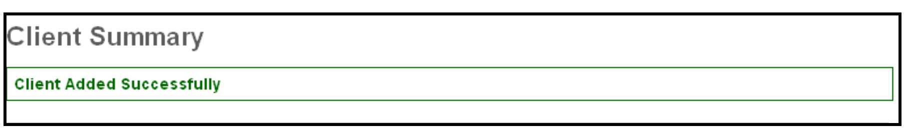
1. Click add a client link.

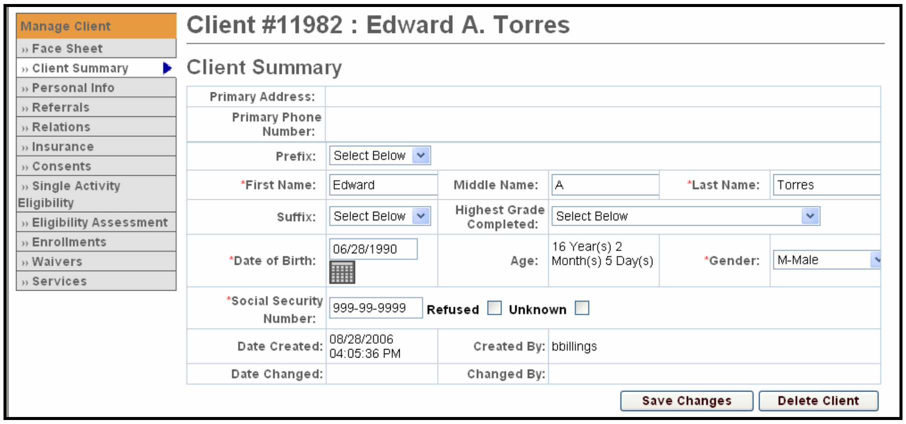
*The **Add Client** page appears.*



2. Enter required information.
3. Click **Save New Client**.

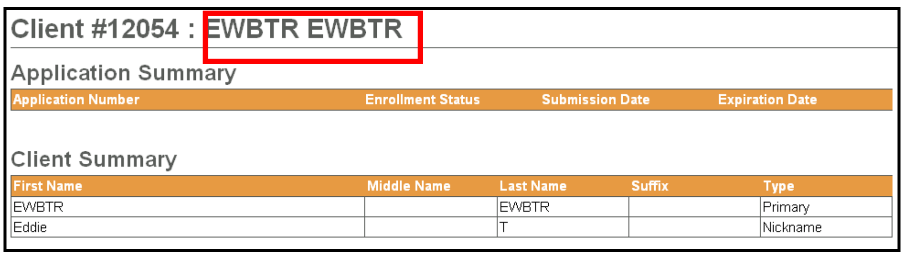
*The **Client Summary** page appears, with newly entered information.*





You can update Client Summary information and **Save Changes**, or **Delete Client**.

Tip: The system assigns a unique "Person/Client ID #".



Module 7: Adding and Editing Client Information

Client Information Overview

When managing client information you can:

- Add totally new information for a client
- Update existing client information from the Face Sheet

If clients are being screened for the first time, then the intake worker would be collecting and entering all information needed to make an eligibility determination for the particular program the incoming client is applying for in order to enroll in a program.

Adding Client Information

To add client information for the first time you must enter the following information for:

1. Personal Info including:
    a. Addresses
    b. Phones
2. Referrals
3. Relations
4. Insurance
5. Consents

Note: The above information can also be updated at any time once entered.

Personal Info

To add personal info:

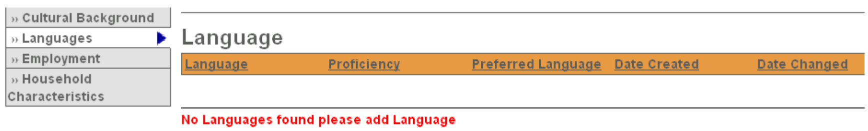
Start from the **Applicant Face Sheet Summary** page, select **Personal Info** from the navigation bar.

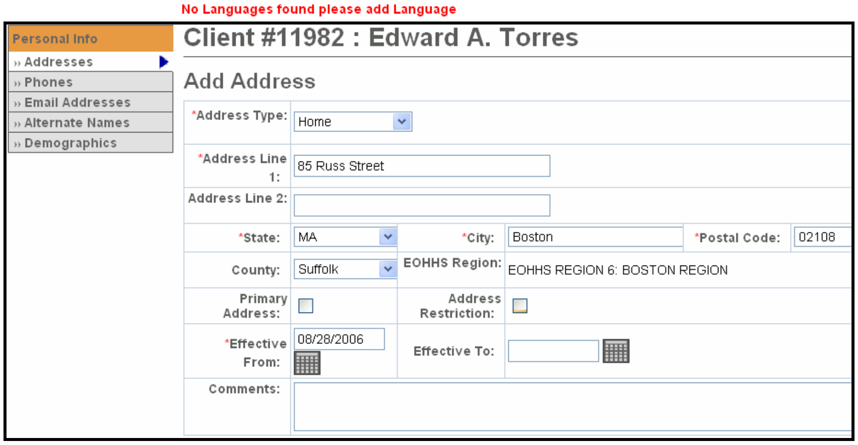
*The **Addresses** page appears.*

Adding Address Information

1. Click add a new Address link.

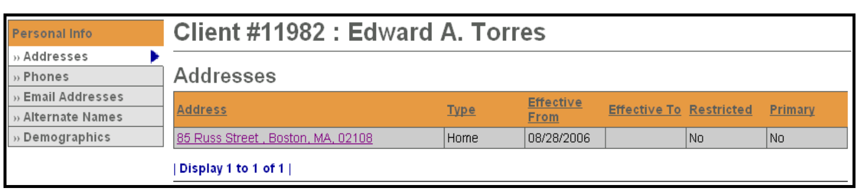
   *The **Add Address** page appears.*





2. Enter required information.
3. Click **Save New Address**.

   *The **Addresses** page reappears with the newly entered information.*

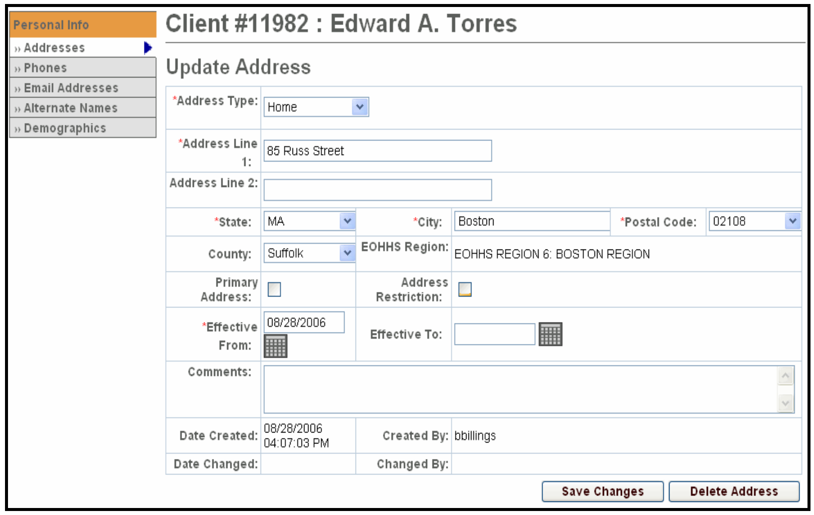


Updating Address Information *(continued)*

To update **Address** information:

1. Click the Address link.

*The **Update Address** page appears.*



2. Edit required information.

3. Click **Save Changes**

*You are returned to the **Addresses** page.*

Tip: To remove the address entered, click **Delete Address**.

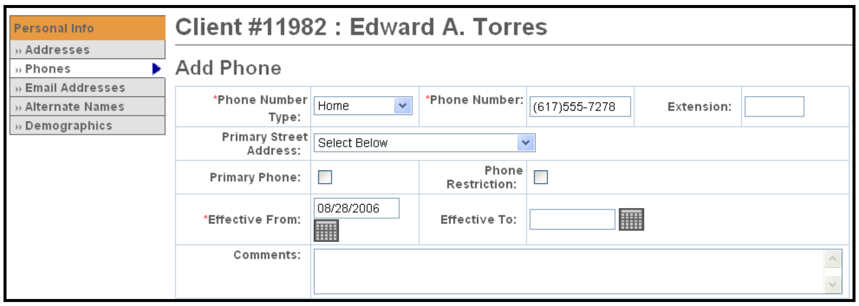
Adding Phone Information

1. Select Phones from the navigation bar.

   *The **Phones** page appears.*

2. Click the add phone link.

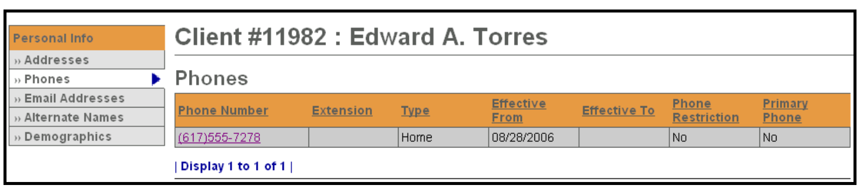
   *The **Add Phone** page appears.*



3. Enter required information.

4. Click **Save New Phone**.

   *The **Phones** page reappears with the newly entered information.*



Tip: You can maintain multiple phone numbers (home, cell phone, etc.).

Updating Phone Information

To update **Phone** information:

1. Click the Phone link.

*The **Update Phone** page appears.*

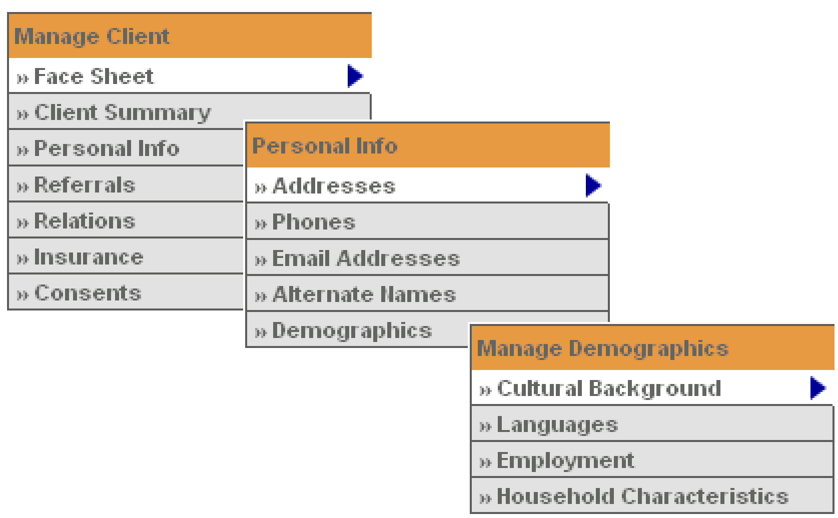
2. Edit required information.
3. Click **Save Changes**.

*You are returned to the **Phones** page.*

Tip: To remove the phone number entered, click **Delete Phone**.

Navigation Bar

Use this expanded navigation bar illustration to direct you through adding and updating information.



Adding Cultural Background information

To add **Cultural Background Information.**

1. Select **Demographics** from the navigation bar.

   ***Manage Demographic**s navigation bar appears, with the **Cultural Background** page as the default.*

2. Click Add Cultural Background Information link.

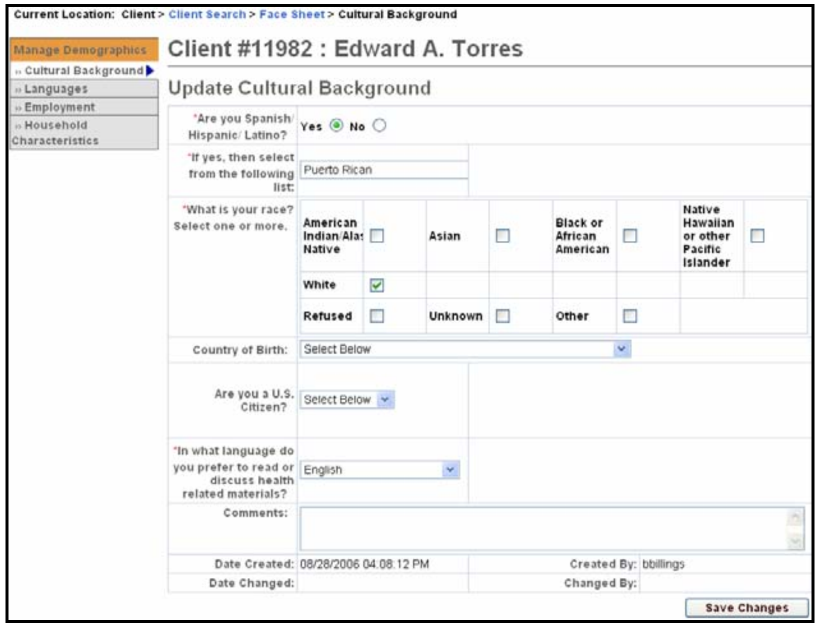
   *Add **Cultural Background** page appears.*

3. Enter required information.

4. Click Save New Cultural Background.

   *The **Update Cultural Background** page appears with the newly entered information.*

Updating Cultural Background Information



To Update **Cultural Background Information**:

1. Edit required information.
2. Click **Save Changes**.

   A message displays, "Cultural Background Updated Successfully".

Note: You cannot delete Cultural Background Information.

Adding Languages

To add **Languages**:

1. Select Languages on the navigation bar.

   *The **Add Language** page appears.*

2. Enter the required information.
3. Click Save New Language.

   *The **Language** page reappears with the newly entered information.*

Adding Household Characteristics

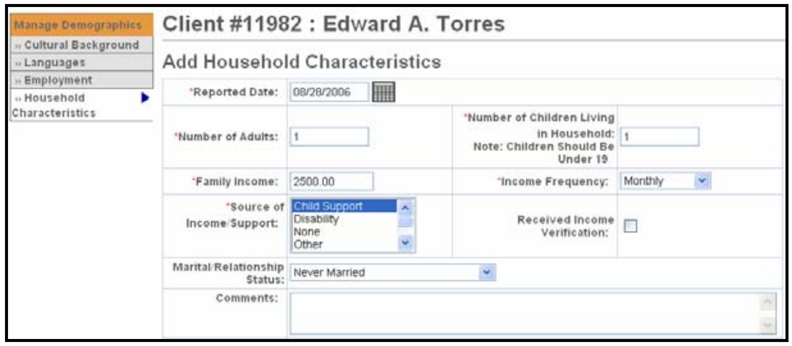
To add **Household Characteristics**:

1. Select **Household Characteristics** from the navigation bar.

*The **Household Characteristics** page appears.*

2. Click **Add Household Characteristics**.

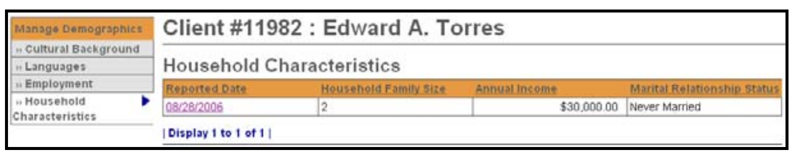
*The **Add Household Characteristics** page appears.*



3. Enter required information.

4. **Save New Household Characteristics**.

*The **Household Characteristics** page reappears with newly entered information.*



Adding Insurance Information

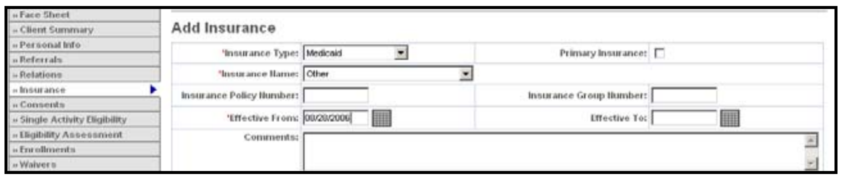
To add **Insurance** information:

1. Select **Insurance** from the navigation bar.

   The Insurance page appears.

2. Click add Insurance link.

   *The **Add Insurance** page appears.*



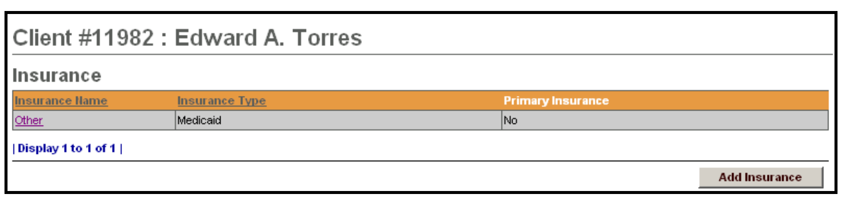
3. Enter required information.
4. Save New Insurance.

Editing Insurance Information

To edit **Insurance** information:

1. Select **Insurance** from the navigation bar.

*The **Insurance** page appears.*



2. Click the Insurance Name link.

*The **Edit Insurance** page appears.*

3. Edit required information.
4. Click Save Changes.

*The **Insurance** page reappears with the newly entered information.*

What is a Consent?

A Consent in EIM/ESM differs from the “Consent to Serve” or “Consent to Share Data” that are used for SBHC.

In EIM/ESM a consent allows you to share client demographic or service information with another provider.

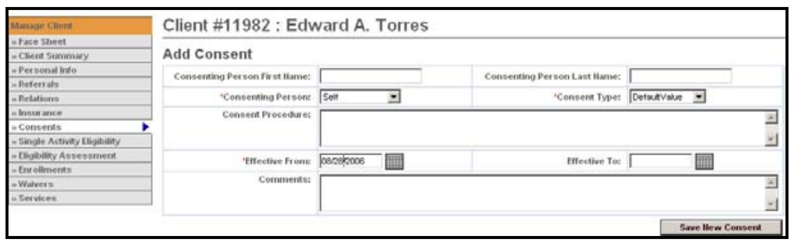
Important: Therefore, these consents are used to solely facilitate client referrals.

Adding Consents

To add a **Consent:**

1. Select the **Consents** from the navigation bar.

   *The **Add Consent** page appears.*



2. Enter required information.
3. Click Save New Consent.

   *The **Consents** page reappears with the newly entered data.*

Updating Consents

To update a **Consent**:

1. Select **Consents** from the navigation bar.

   *The **Consents** page appears.*

2. Click the Consenting Person link.

   *The **Update Consent** page appears.*

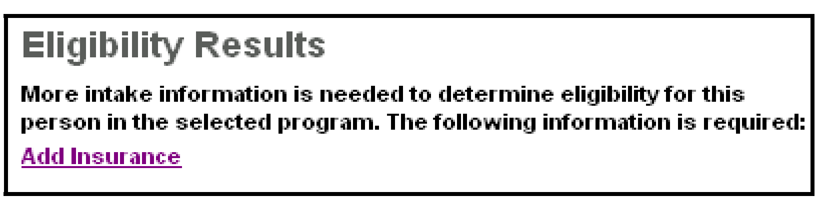
3. Edit required information.
4. Click **Save Changes**.

Adding and Updating Client Information

When the system is unable to determine eligibility because of missing information, it provides links to forms where information can be entered.

Often, incoming clients do not present with all information needed for eligibility determination and enrollment.

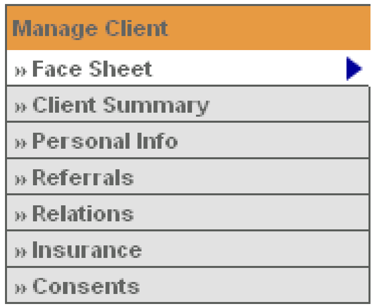
If required information (demographic data collection) is missing, the system notifies the provider and supplies links to screens where the required information can be entered. Once the information is entered, the provider screens for eligibility again.



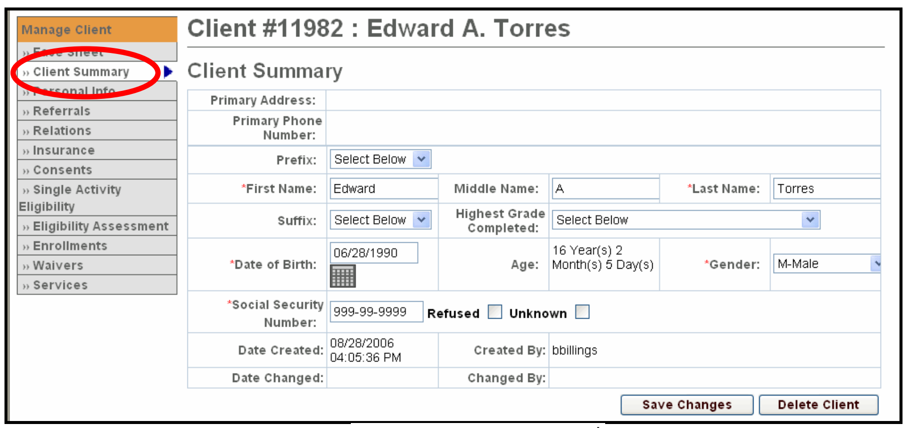
Editing Client Information From the Face Sheet

Information can also be added and edited from the **Face Sheet**.

When the **Face Sheet** is displayed, the navigation bar provides categories that link to forms where information can be edited.

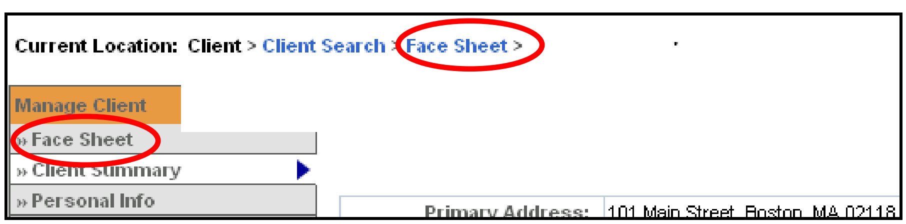


Note: Personal Information and Referrals lead to sub-menus. When you click a category on the navigation bar, a form appears. When you select Personal Info, you can access demographic and household information.



Add information, and click .

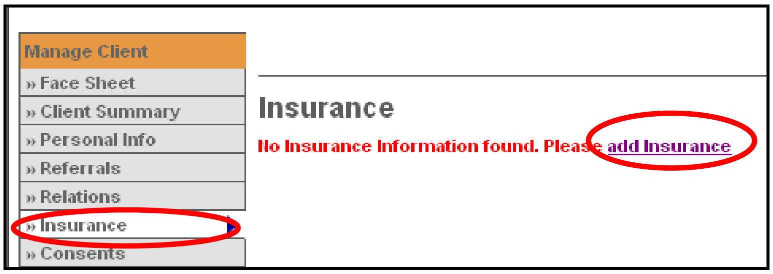
Tip: Click **Face Sheet** in breadcrumbs or on the navigation bar to return to the Face Sheet page, where you can screen for eligibility or edit other information.



Editing Client Information From the Face Sheet

In ESM, an applicant may have multiple addresses, phone number, types of insurance, referrals, relations etc. on record. Use the following process to add an information set:

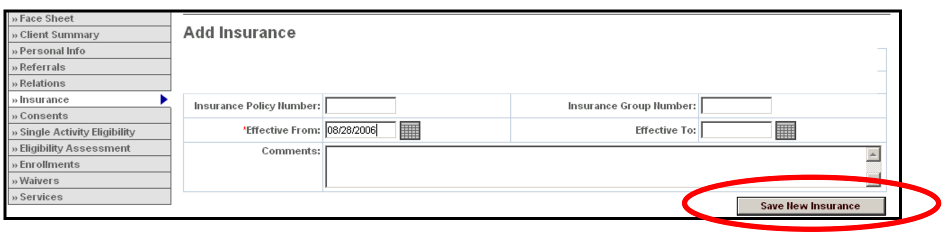
1. Select the information category.
2. Click Add (Item) (item may be insurance, address, referral, etc.)



3. Complete required fields on page.

Note: Required fields are marked with a red asterisk.

4. Click **Save** (Item). (item may be insurance, address, referral, etc.)



Tip: Click Face Sheet in breadcrumbs or on the navigation bar to return to the applicant's **Face Sheet**.

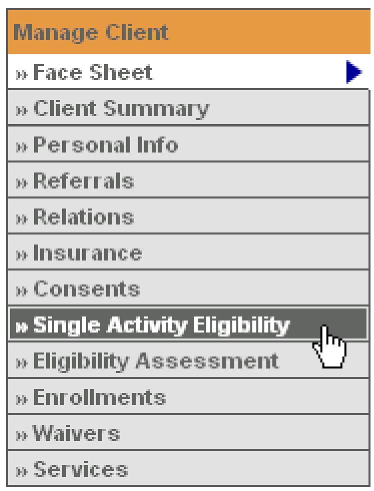
Module 8: Enrolling a Client into a Program starts with Eligibility

Eligibility Overview

Before enrolling, the client must be determined eligible for the selected activity.

During this process, ESM compares the client's data to the eligibility rules of the activity and makes a determination.

Currently, you must use the Single Activity Eligibility feature to screen for one program at a time. In future releases, a feature will be added that allows providers to screen for multiple programs at once.



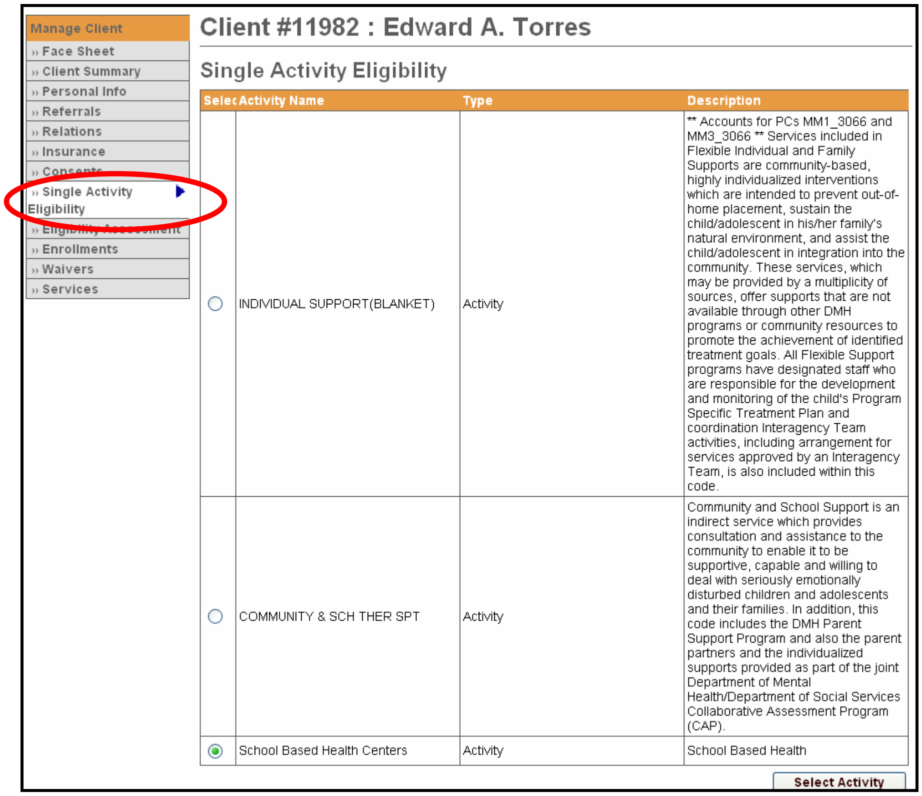
You can begin the screening process by selecting **Single Activity Eligibility** from the navigation bar.

Single Activity Eligibility

Note: Enrolling a client starts with eligibility and occurs after you add a client.

To access the **Single Activity Eligibility** page:

1. Access the applicant's **Face Sheet**.
2. Click the Single Activity Eligibility link in the navigation bar.
   *The **Single Activity Eligibility** page appears.*



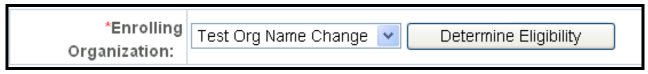
3. Select Activity Name .
4. Click Select Activity.

   The page expands.

5. Select a Contract from the pick list.
6. Click Select Contract.

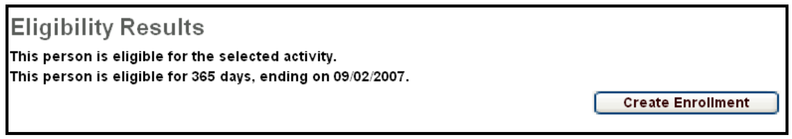
Single Activity Eligibility

The page expands.



7. Select Enrolling Organization from the pick list.
8. Click Determine Eligibility.

   The page reappears with Eligibility Results.

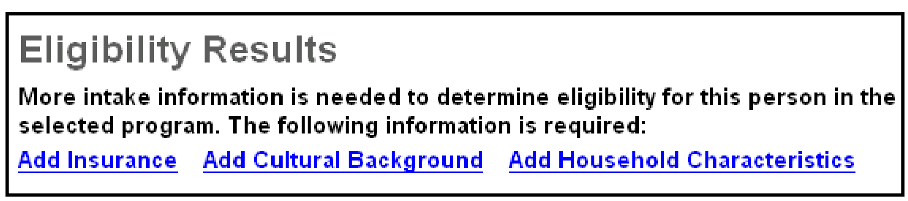


Note: This is how you determine eligibility for enrollment.

Results of Eligibility Screening

There are three possible results of eligibility screening:

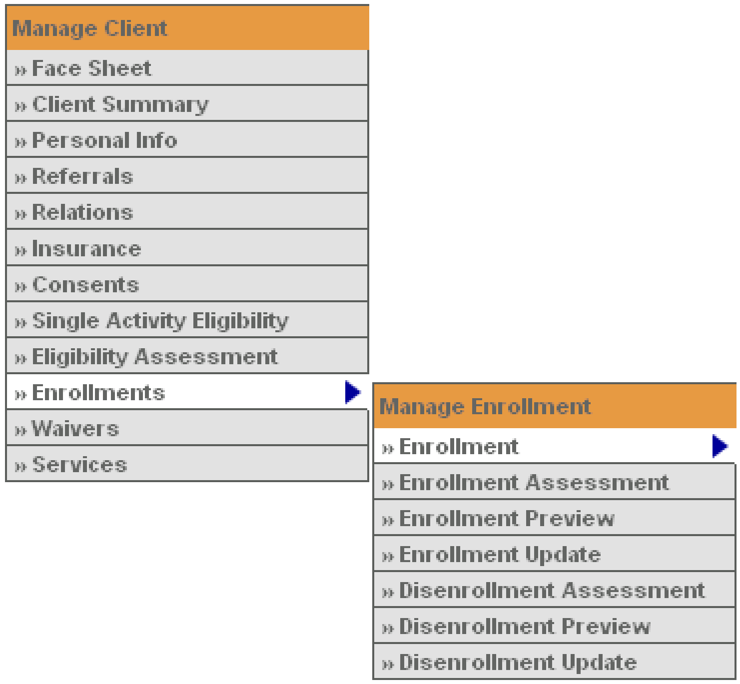
1. The applicant is determined to be eligible. Click Create Enrollment to enroll the applicant.
2. Additional information is needed to make a determination.
3. In this case, the system provides links to forms where information can be entered. See *Adding and Editing Client Information* module for more details. Take note if multiple links appear for eligibility results. Once, you have selected one of these links this page will not reappear. Use the left navigation bar to assess the pages needed to complete missing information that is required.



New Annual Enrollment Process/Re-Enrollment Requirements

Managing the Enrollment Process

Here's an example of the left navigation bar expanded showing the links available to manage the enrollment process.

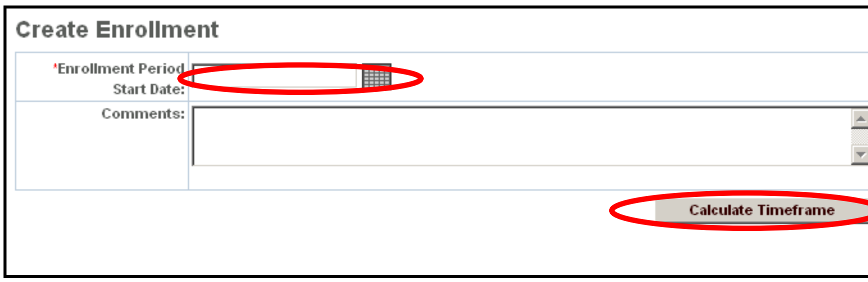


Create Enrollment

Note: The applicant must be screened through the Single Activity Eligibility process before he or she can be enrolled.

Tip: You can add an enrollment from the Single Activity Eligibility page or select **Enrollment** from the navigation bar.

1. Access the **Single Activity Eligibility** page and determine eligibility.
2. Click **Create Enrollment**.
   The Create Enrollment page appears.



3. Enter **Enrollment Period Start Date**. This date must be within the last **120** days.
4. Click **Calculate Timeframe**.
   *The **Enrollment Confirmation** block appears.*
5. Enter a medical record number (optional)
6. Click **Confirm Enrollment**.

   *The **Update Enrollment** page appears with a message, "Enrollment Added Successfully!!!"*

Optional: Add comments and click **Save Changes**.

To update the Enrollment, edit required information and click **Save Changes**.

Accessing the Enrollments Page

Tip: This is a useful way to access and verify enrollment.

To view enrollments:

1. Access the **Face Sheet** page.
2. Click the Enrollments link in the navigation bar.
   *The **Enrollments** page appears.*

Client #11982 : Edward A. Torres

Enrollments

Enrollment ID	ActivityCode	Activity Name	Status	Start Date	End Date
620	3422	School Based Health Centers	Active	08/28/2006	08/27/2007

Note: A client may have multiple enrollments for a program, but only one can be **active**.

The Enrollment Assessment

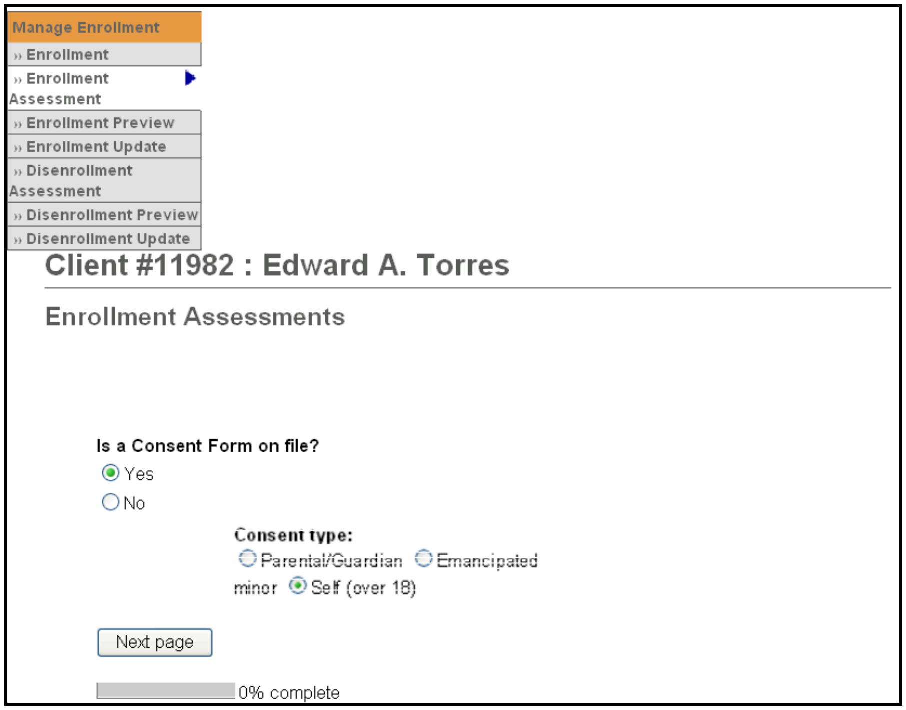
The enrollment assessment asks additional questions that are applicant-specific. You must complete the assessment to complete the enrollment process.

Completing an Enrollment Assessment

To complete an enrollment assessment:

1. From the **Update Enrollment page**, select **Enrollment Assessment** in the navigation bar.

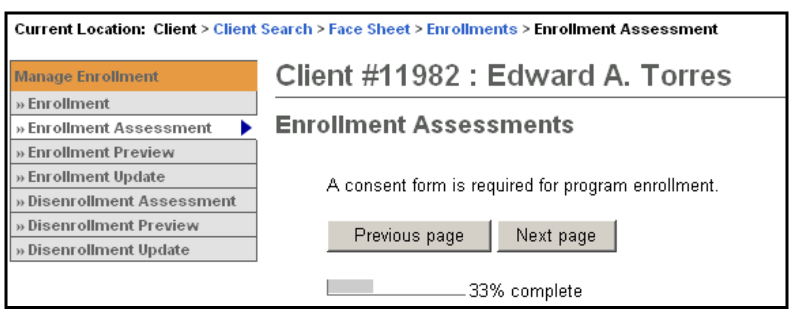
   *The **Enrollment Assessment** page appears.*



2. Enter required field information.

3. Click Next page.

   Additional enrollment assessment questions appear.



Completing an Enrollment Assessment

(continued)

4. Enter required field information.

   The enrollment assessment is complete.

5. Click Submit survey.

   The Enrollment Assessment page appears with a message, "The assessment has been completed successfully."

Notes:

- After the enrollment process is completed, the applicant now becomes an active client.
- If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.

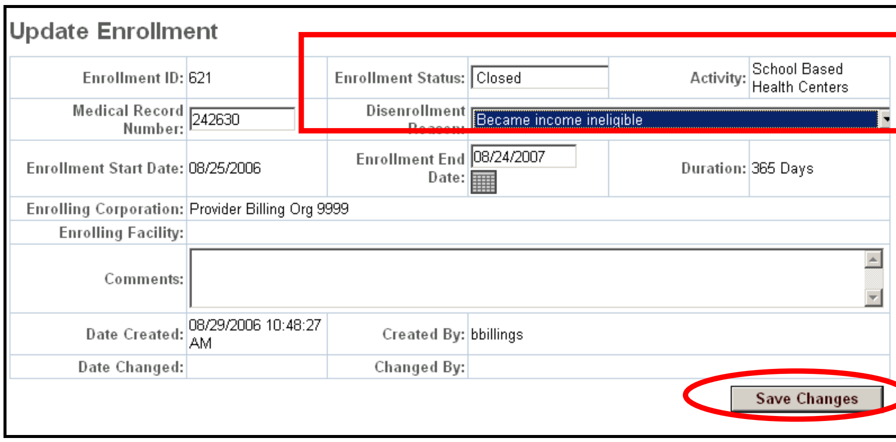
Disenrolling a Client

A client is automatically enrolled for a year. During that year, however, the client may drop the program or become ineligible due to changes in income, insurance, etc. When that happens, the enrollment should be *closed*.

To close an enrollment:

1. Access the **Enrollments** page.
2. Click the link for the enrollment you wish to close.

   *The **Update Enrollment** page appears.*



3. Edit the necessary information.
   - Mark enrollment status closed.
   - Select reason for disenrollment.
   - Optional: enter comments.
4. Click **Save Changes**.
   *The **Update Enrollment** page appears.*

Re-enrolling a Client

To re-enroll a client:

1. Check basic Demographic information (address, phone, etc.)
2. Update Demographic information if necessary
3. Enter Single Eligibility Activity
4. Create Enrollment
5. Enter Enrollment Assessment

Note: When performing steps 3 -5, you are repeating the initial enrollment process.

Module 9: Adding Services

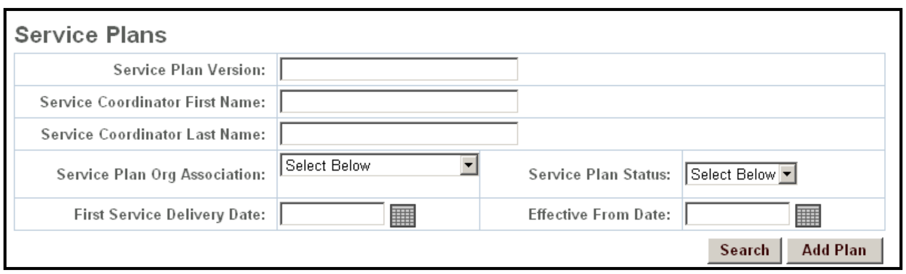
To record services, users must be in a specific service plan for a specific client. To begin recording services, a client's service plan must first be found or created if one does not exist.

Note: All services entered will be professional services.

Adding Service Plans

To add a service plan:

1. Access the **Clients** page.
   *The **Client Search** page appears.*
2. Enter search criteria.
3. Click Search.
   The Search Results appear below the search criteria.
4. Click the Client link.
   *The **Applicant Face Sheet Summary** page appears.*
5. Click **Services** from the navigation bar.
   *The **Service Plans** page appears.*



6. Click Add Plan.
   *The **Add Service Plan** page appears.*

Note: Search from this page to determine whether a service plans exists for the client.

Adding Service Plans

(continued)

7. Enter plan details, making sure to populate all required fields.

Notes:

- The **Effective From** and **Effective To** date fields are very important. The system verifies that all tasks, services or notes associated with the service plan fall within the effective dates.

- The system does not allow two active service plans of the same type to exist for an individual client.

8. Click Save New Service Plan.
   *The **Service Plan Summary** page appears.*

Tip: If a plan was created in error, it can be deleted from this page (assuming all plan contents have been deleted or have an Error status).

Service Delivery Data Tips: ACRU

There are several key activities that typically comprise entering service records:

1. **A**dd professional service
2. **C**omplete appropriate assessment, as required
3. **R**eport results or diagnosis
4. **U**pdate service status

A service plan is now prepared to be billed.

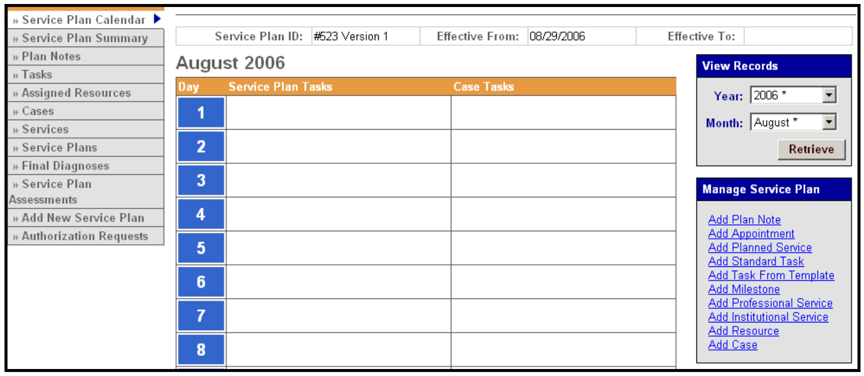
Note: Not all professional services will require screening assessments, results, and/or final diagnoses.

Adding Professional Services

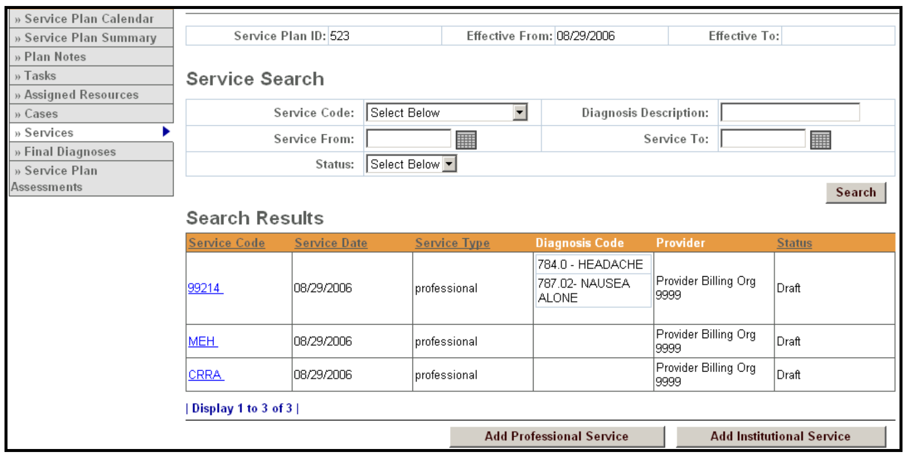
To add a professional service:

1. Access the **Service Plan Summary** page.
2. Select **Services** from the navigation bar.

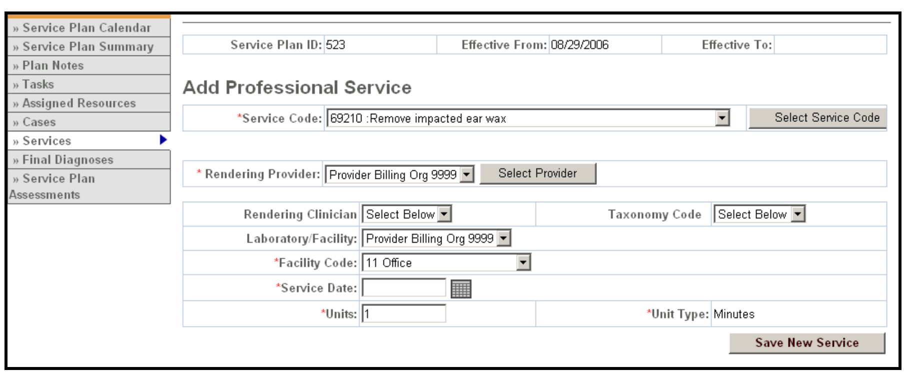
   *The **Service Plan Calendar** page appears.*



3. Select **Services** from the navigation bar.
   *The **Service Search** page appears.*



4. Click **Add Professional Service**.
   *The **Add Service** page appears.*



Tip: The Add Professional Service link may also be accessed from the **Service Plan Calendar** view.

5. Select a **Service Code**.

Additional data entry fields appear.

6. Select a **Rendering Provider**.
   Additional data fields appear.
7. Enter service details, making sure to populate all required fields. Marked with red asterisk.
8. Click Save New Service.
   *The **Service Summary** page appears with a message stating that the record has been successfully saved.*

Adding a Diagnosis

To add a diagnosis:

1. Access the **Service Summary** page.
2. Click Add Diagnosis.

   *The **Diagnosis Search** page appears.*
3. Enter **Description** in textbox.

Tip: If your search results do not generate the expected results, use a % before key words.

4. Click Search.

   The search results appear below service search.
5. Click Save Diagnosis.

   *The **Service Summary** page appears with the Diagnosis Code displaying.*
6. Update Status to **Reported**.
7. Click Save Changes.

   The record has been saved .

Completing a Screening Assessment

A Screening Assessment may be completed in conjunction with adding a Professional Service. If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.

To complete a screening assessment:

1. Access the **Service Summary** page.
2. Select **Screening Assessment** in the navigation bar.

*The **Screening Assessment** page appears.*

3. Select Assessment Name.
4. Click Complete Assessment.

*An additional **Screening Assessment** page appears.*

5. Click Next page.

*A **Screening Assessment** page appears stating the assessment is complete.*

6. Click Submit survey.

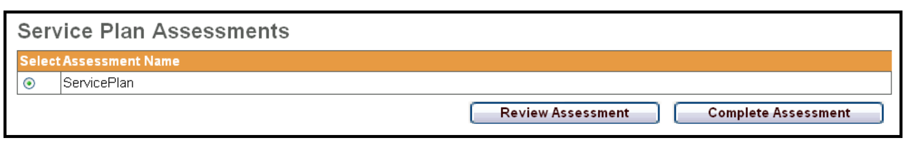
*The **Assessments** page appears with a message, "the assessment has been completed successfully".*

Recording Service Results

To record a service plan assessment:

1. Access the **Service Plan Calendar** page.
2. Select **Service Plan Assessments** from the navigation bar.

   The **Service Plan Assessment** page appears.

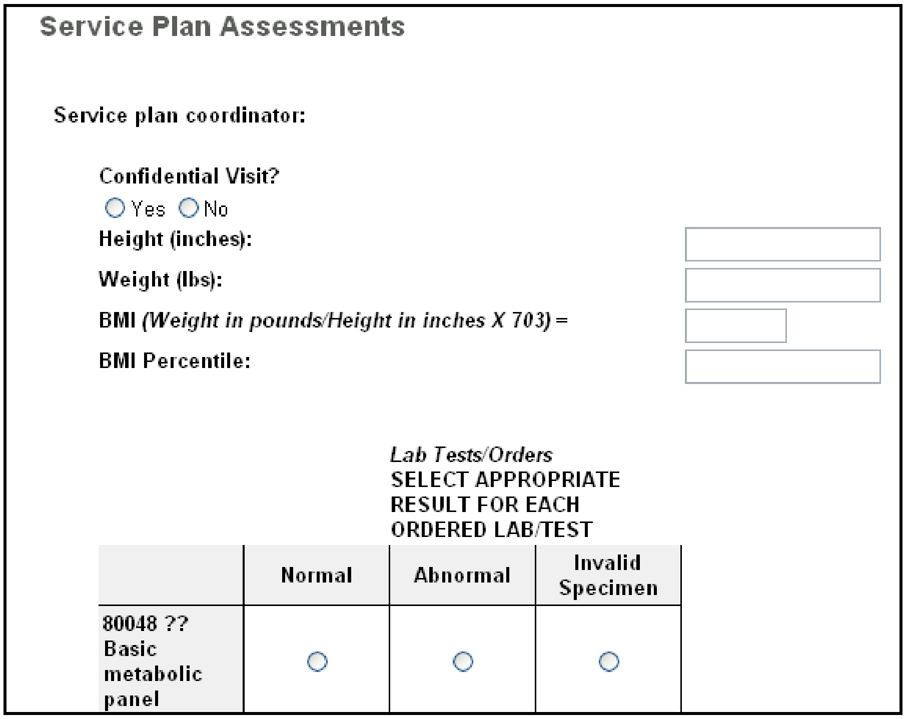


3. Complete Assessment.

*The **Service Plan Assessment** form appears.*

Recording Service Results

(continued)



Service Plan Assessments

Service plan coordinator:

Confidential Visit?

Yes No

Height (inches):

Weight (lbs):

BMI *(Weight in pounds/Height in inches X 703)* =

BMI Percentile:

Lab Tests/Orders
SELECT APPROPRIATE RESULT FOR EACH ORDERED LAB/TEST

	Normal	Abnormal	Invalid Specimen
80048 ?? Basic metabolic panel			

4. Complete assessment.

5. Click Submit.

The ***Service Plan Assessment*** *page reappears with the assessment completed successfully.*

Updating Status

For SBHC update status to Reported.

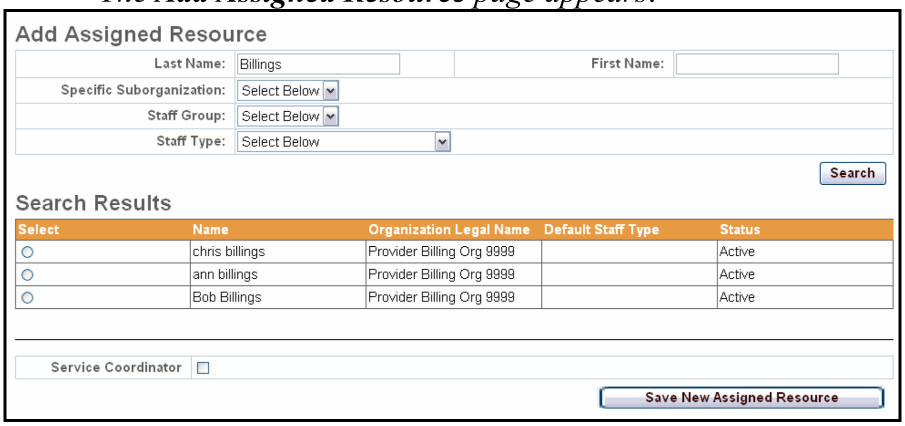
Module 10: Managing Service Plans

Managing Service Plans: Assigned Resources

Authorized users can maintain resources for a client's service plan. The resources assigned to the client's cycle of care can then be referenced as part of a particular task, appointment or scheduled procedure.

To add an assigned resource:

1. Access the **Service Plan Calendar** page.
2. Click **Assigned Resources** on the navigation bar.
   *The **Assigned Resources** page appears.*
3. Click Add Resource link.
   *The **Add Assigned Resource** page appears.*



   Note: A resource search may be conducted based on the resource's last name, specific sub-organization, and staff group or staff type.

4. Select the desired resource in the **Search Results**.
5. Select the **Service Coordinator** check box to identify the resource as a Service Coordinator, if desired.
6. Click Save New Assigned Resource.
   *The **Assigned Resources** page appears with the new resource.*

Module 11: Reporting

Introduction

Typically, reports are generated by an authorized user who chooses report content and format as part of submitting a reporting request.

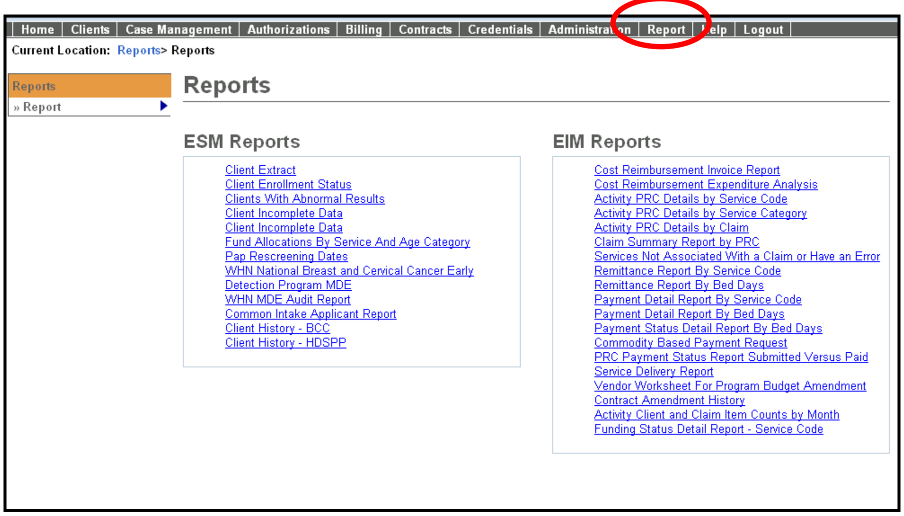
Key Terms

The following terms will help in understanding how reports function:

- **Service Management Reports:**
  Reports related to ESM functionality
- **Financial Management Reports:**
  Reports related to EIM functionality
- **Report Selection Criteria:**
  Parameters/filters a provider enters when requesting a report
- **Report Output Format:**
  Reports can be created as Excel, PDF, or HTML files
- **Report Frequency:**
  Reports in EIM/ESM are scheduled on-demand

Accessing the Reporting Feature

To access the reporting feature of *EIM/ESM*: Access the **Reports** module. *A list of Financial and Service Management reports appears.*



Note: Access to reports is based on user security roles.

Reports Catalog

The table below lists the reports available in ESM.

Report Name	Purpose
Client Extract Report	Provides a list of demographic data elements regarding clients that are scheduled for follow-up
Services Not Associated With a Claim or Have an Error	Provides a list of all services that are in draft or ready state that have not been associated with a claim or services that have been rejected
Enrollment Status Report	Provides a list of clients enrolled within some specified timeframe
Clients with Abnormal Results	Identifies clients with abnormal test results that require monitoring or follow-up
Activity Client and Claim Item Counts by Month	Provides a monthly count of clients currently enrolled and the number of claims and claim items submitted on behalf of those clients

Entering Report Criteria

Criteria selection tailors report results. By entering criteria, a user can determine the details and grouping of the report data. Criteria include dates, programs, locations, and contract numbers.

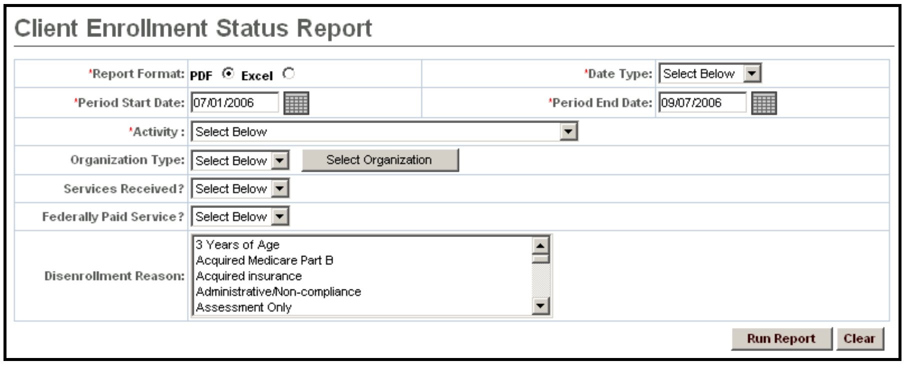
To enter criteria and run a report:

1. Access the **Reports** module.
   A list of Financial and Service Management reports appear.
2. Click the name of the individual report link.
   *A **Report Criteria** page appears.*

   Note: The **Report Criteria** page will differ depending upon the specific report being requested.
3. Enter criteria.
   Important: Report criteria is not printed on the report or preserved in the system. Users may find it helpful to record criteria manually.
4. Select **Report Format**.
5. Click Run Report.
   A file is generated that users may save for later viewing.

Tip: Click Clear to clear out report criteria entered.

Enrollment Status Report



Trouble - Shooting

Problem	Possible solutions
Why am I not getting the results I expected?	• Double-check that criteria filters are correct • Consider user security
Why doesn't this match my legacy reports?	• Double-check that criteria filters are correct
Why Can't I run the Personnel Summary Report (PSR)?	• EIM/ESM Application is able to run this report only when the Internet Explorer Pop-up blocker has been turned off.

Note: Based on an organization's management, different results will display.